Completing a New Hire Overview

The Hire/Rehire Employee business process is applicable to both salary and wage employees.

This process is also used when transferring an employee from one agency to another. For further information on transferring employees, refer to the Job Aid titled **HR351 Completing an Inter-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: Before starting the new hire process, validate the position selected is the required position and all data related to the position is as expected. For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position and Job Change**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Link the employee to the New Hire checklist as a guide through the COVA New Hire tasks to complete. For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: On the personal data, there is an Exclude Contact Information checkbox. If this checkbox is checked the employee will NOT be included in the Active directory or employee directory. (e.g., an employee that has a court order like an order of protection or restraining order against someone)

Ensure the job aid is followed carefully as entering incorrect or missing information in personal data fields will cause significant impact to downstream payroll and benefits processes. (i.e., Anthem, Aetna, and VRS)

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Add a New Hire

Before beginning, the applicable employee’s SSN must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or if the employee is already in the system, to obtain the existing Employee ID.

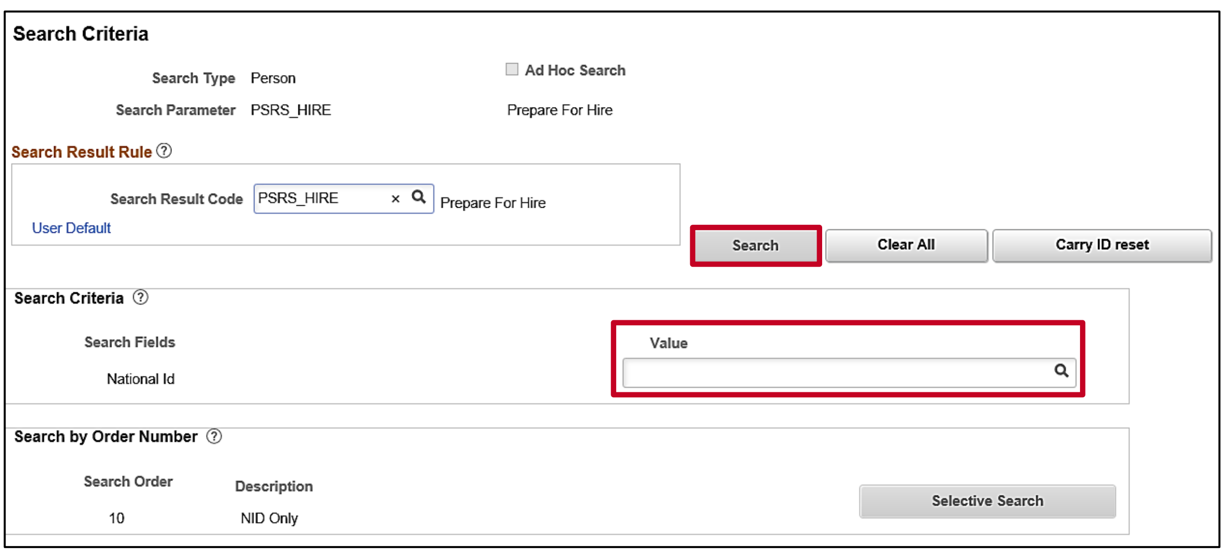
1. Navigate to the **Add a Person** page using the following path to search for matching persons:

   Navigator > Workforce Administration > Personal Information > Add a Person

The **Add a Person** page displays.

2. Click the Search for Matching Persons link.

The **Search Criteria** page displays.

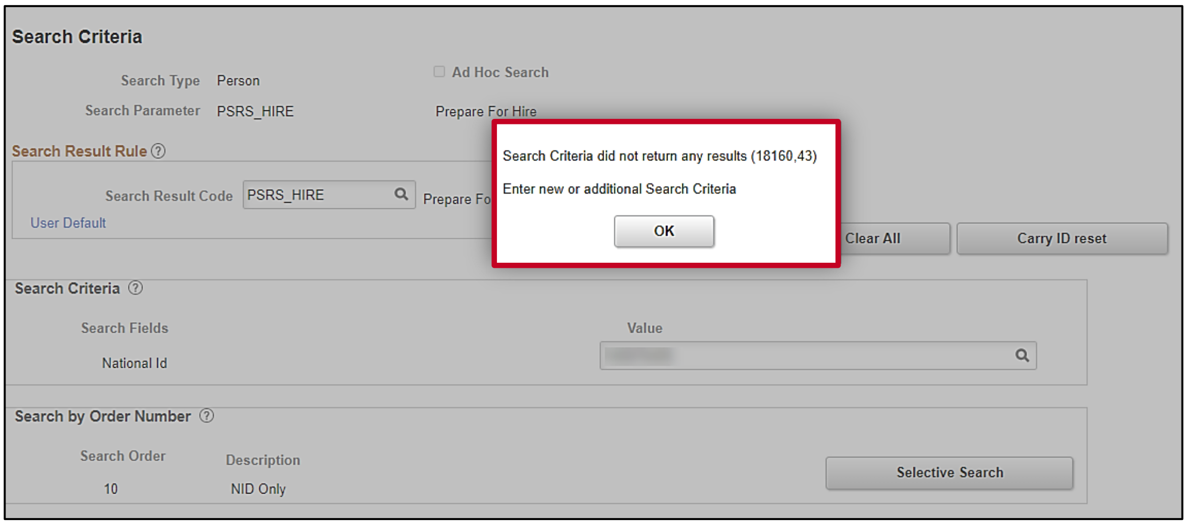


3. Enter the employee’s SSN into the **Value** field.
4. Press the **Tab** key on the keyboard to enable the **Search** button.

   Note: The SSN is reformatted automatically (i.e. dashes are removed if they were entered).
5. Click the **Search** button.

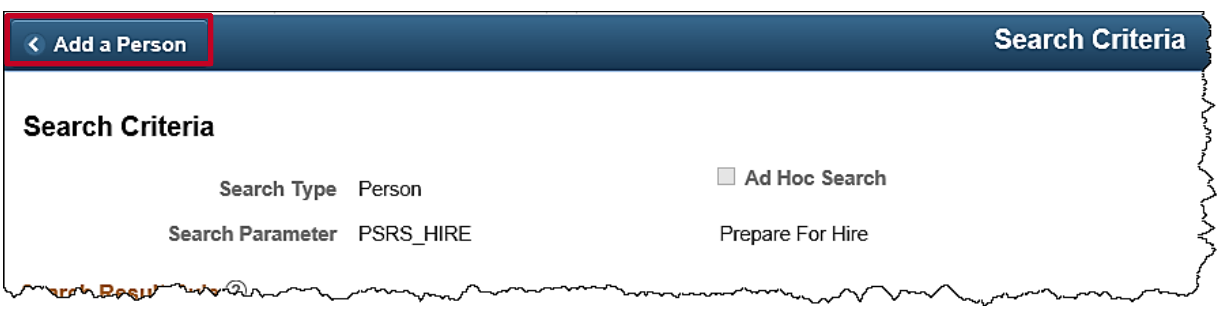
The **Search Results** page displays in a pop-up window.

Note: The message depicted below displays when the employee's SSN is not already in the Cardinal system. In these cases, proceed to Step 6 of this Job Aid. If the system displays an Employee ID, the employee already exists in the Cardinal system. A transfer or rehire should be completed as applicable. For further information on transferring existing employees, refer to the Job Aid titled **HR351 Completing an Inter-Agency Transfer**. For further information on rehiring employees, refer to the Job Aid titled **HR351 Completing a Rehire**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.



6. Click the **Ok** button to close the pop-up window.

The **Search Criteria** page returns.

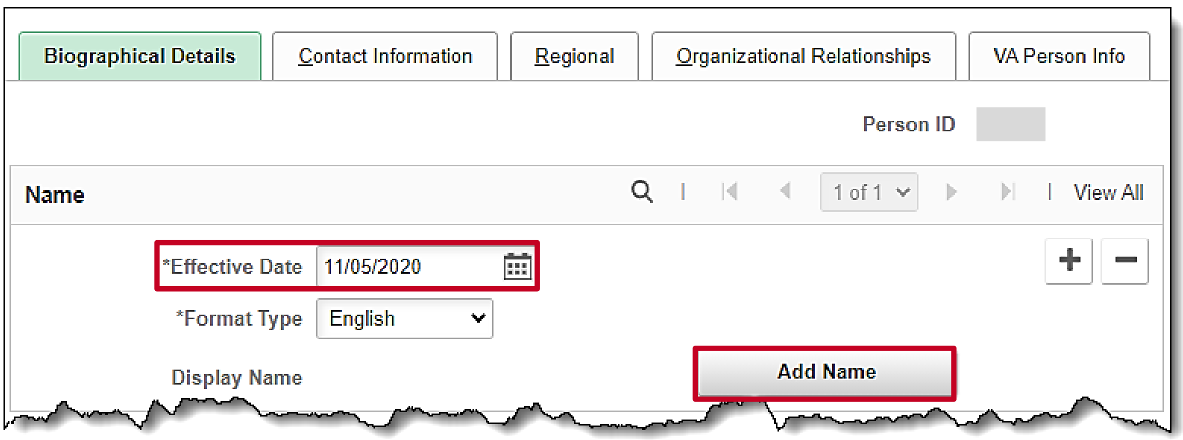


7. Click the **Add a person** tab in the top left-hand corner of the page.

The **Add a Person** page returns.

8. Enter the applicable Person ID in the **Person ID** field.
9. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

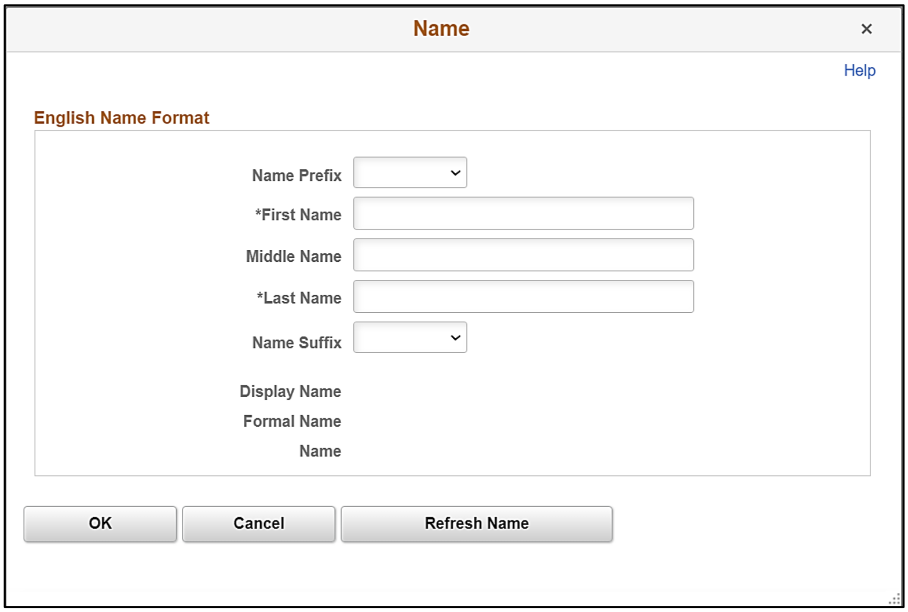


10. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

    Note: The Effective Date cannot be greater than today's date when adding/modifying a person in Cardinal. **For further information on Effective Dating,** see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in Job Aids under **Learning.**

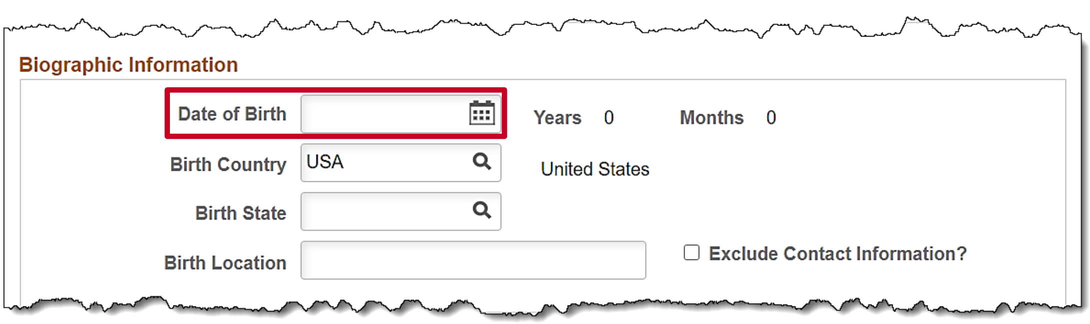
11. Click the **Add Name** button.

The **Name** page displays in a pop-up window.



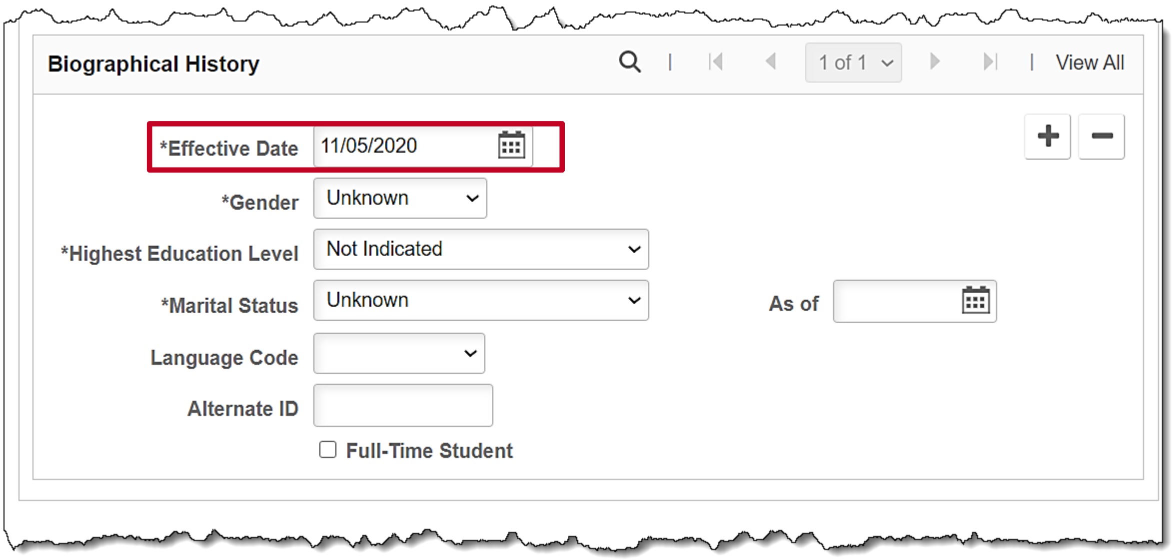
12. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
13. Enter the employee's first name in the **First Name** field (required).
14. Enter the employee's middle name in the **Middle Name** field (optional).
    Note: Please refrain from adding a period behind the middle initial.
15. Enter the employee's last name in the **Last Name** field (required).
    Note: Please do not include suffixes like: Jr, Sr or IV in the **Last Name** field.
16. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
17. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
18. Click the **OK** button.

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as needed.



19. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
20. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
21. Complete the **Birth State** and **Birth Location** fields (optional).

22. Click the **Exclude Contact Information** if employee information should NOT be sent to VITA in the Active Directory Extract or COV Employee Directory Extract. (e.g., an employee that has a court order like an order of protection or restraining order against someone)
23. Scroll down as needed to the **Biographical History** section.
24. The **Biographical History** section displays.

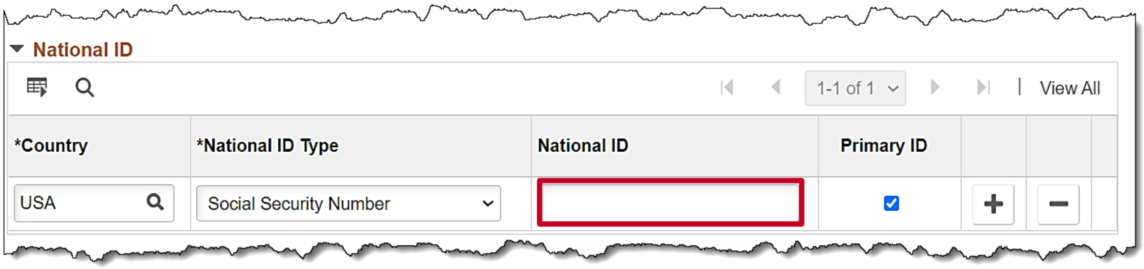


25. The **Effective Date** field within this section defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

    Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

26. The **Gender** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal gender of the employee using the dropdown button.
27. The **Highest Education Level** is a required field and defaults to “Not Indicated”. Select the employee’s highest level of education using the dropdown button.
28. The **Marital Status** is a required field for benefits purposes and defaults to “Unknown”. Select the legal marital status of the employee using the dropdown button.
29. Select the effective date for the employee’s marital status using the **As of Calendar** icon to the right of the **Marital Status** field.
30. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
31. Scroll down as needed to the **National ID** section.

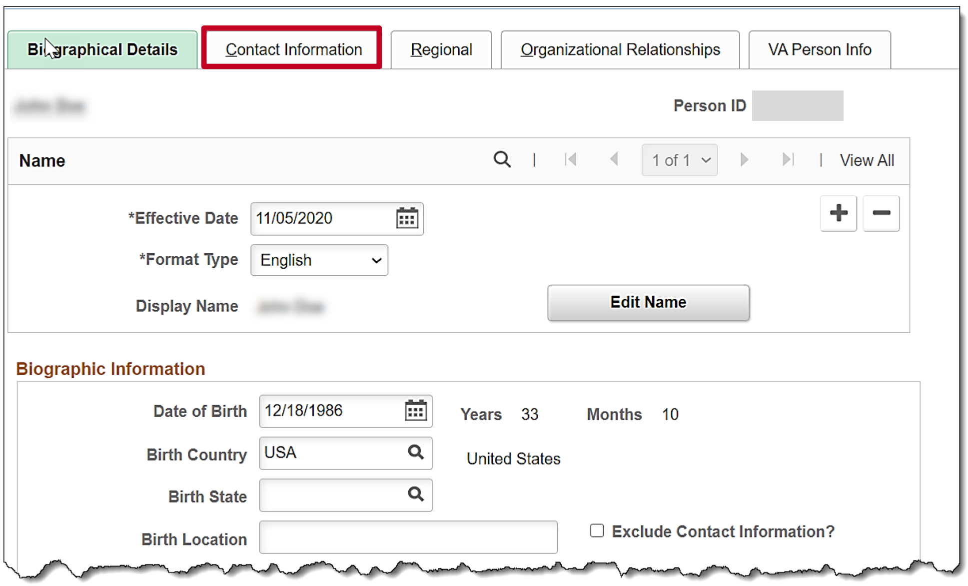
The **National ID** section displays.



32. Enter the employee's Social Security Number (SSN) in the **National ID** field.

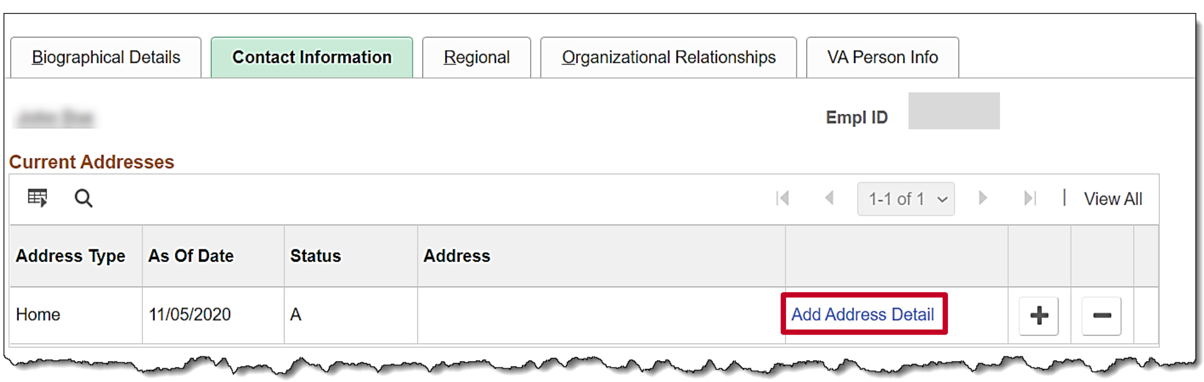
Note: If the Employee ID and the Social Security Number are not the same combination that was entered into PMIS the day before, the transaction can't be completed.

33. Scroll back up to the top of the page as needed.



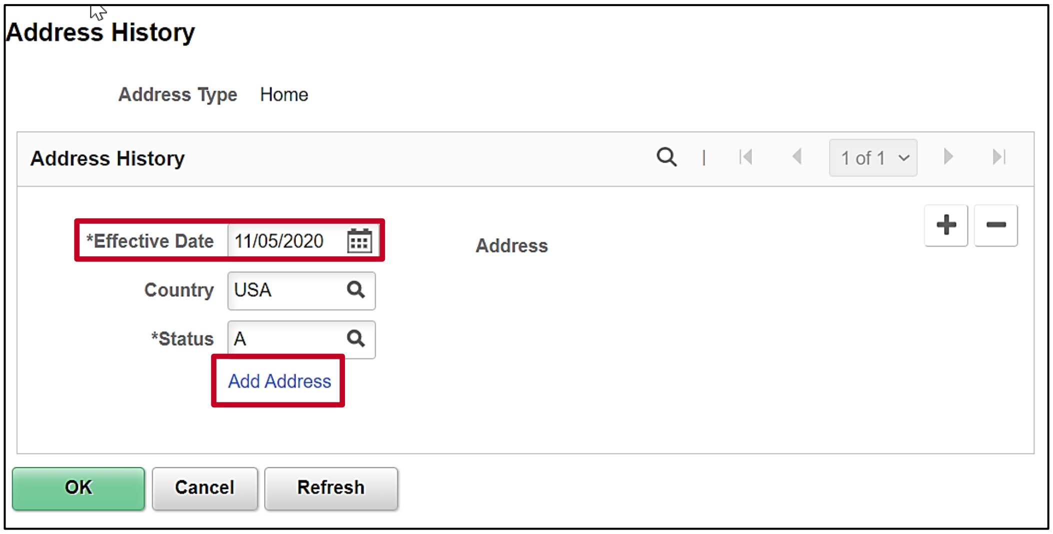
34. Click the Contact Information tab.

The **Contact Information** tab displays.



35. Click the Add Address Detail link.

The **Address History** page displays.

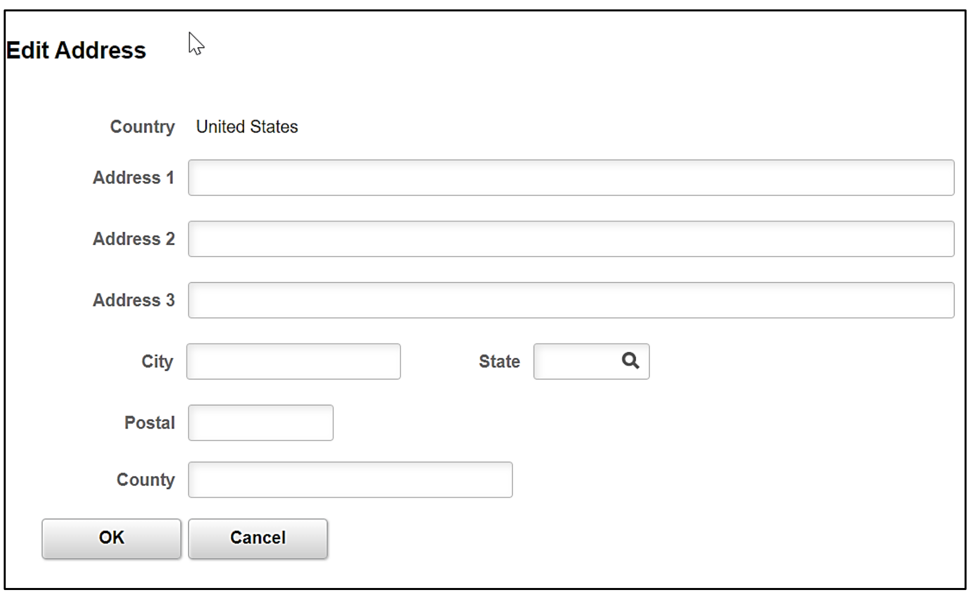


36. The **Effective Date** field within this section defaults to the current date. Update this date to the applicable date of the new hire using the **Effective Date Calendar** icon if required.

Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

37. Click the **Add Address** link.

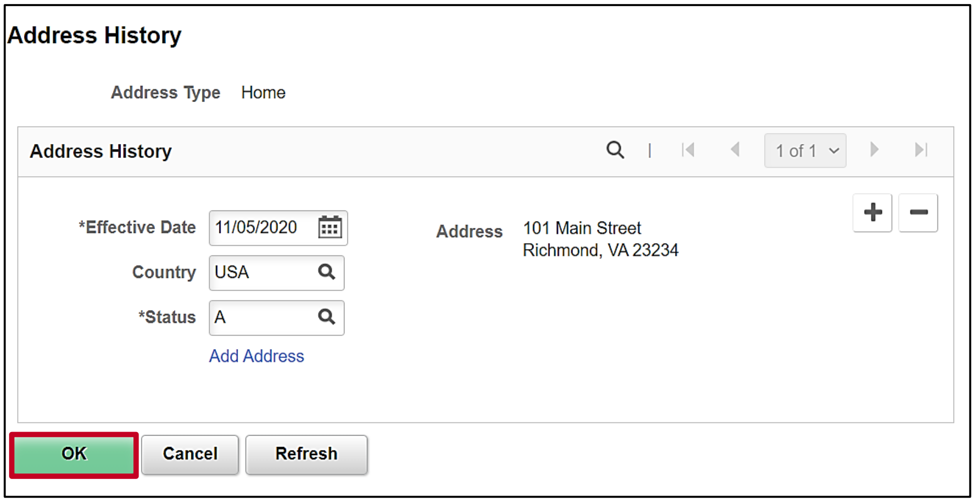
The **Edit Address** page displays.



38. Enter the employee's address information using the applicable fields.
Note: Address 1, City, State and **Postal** are required fields. The employee's personal data cannot be saved if either of these fields are blank.

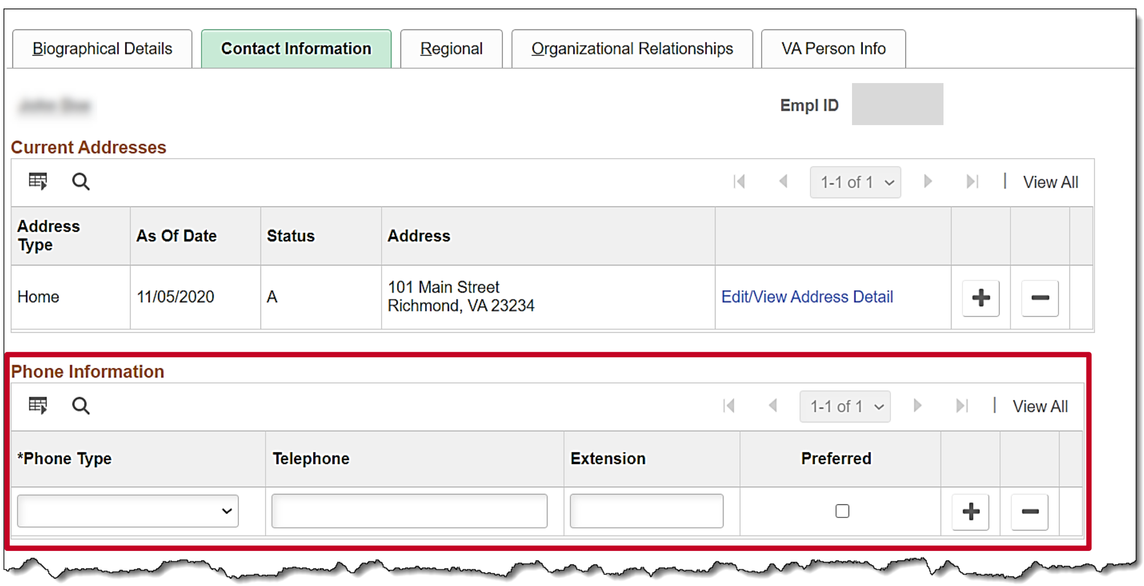
39. Click the **OK** button.

The **Address History** page returns with the address information displayed.



40. Click the **OK** button.

The **Contact Information** tab returns.

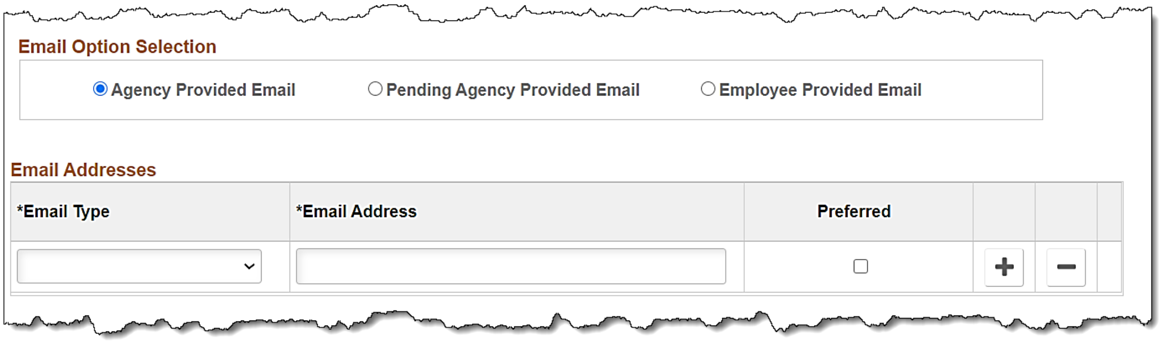


41. Select the type of phone using the **Phone Type** field dropdown button.
42. Enter the applicable telephone number in the **Telephone** field.

    Note: It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.

43. Select the **Preferred** checkbox option if applicable.
44. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (**+**) and then repeating Steps 40 - 42.
45. Scroll down as needed to the **Email Option Selection** and **Email Addresses** sections.

The **Email Option Selection** and **Email Addresses** sections display.



46. Complete these sections based on the following guidelines:

  a. If the employee has been issued a business email:

    i. Accept the default email option of “Agency Provided Email”

    ii. Select an email type of “Business” using the **Email Type** field drop-down button

    iii. Enter the applicable email address in the **Email Address** field

    iv. Select the **Preferred** checkbox option

  a. If the employee’s business email has been requested, but not yet assigned:

    i. Select the “Pending Agency Provided Email” email option by clicking the corresponding radio button option
    ii. Select an email type of “Business” using the **Email Type** field drop-down button
    iii. Enter “Noemail@virginia.gov” in the **Email Address** field

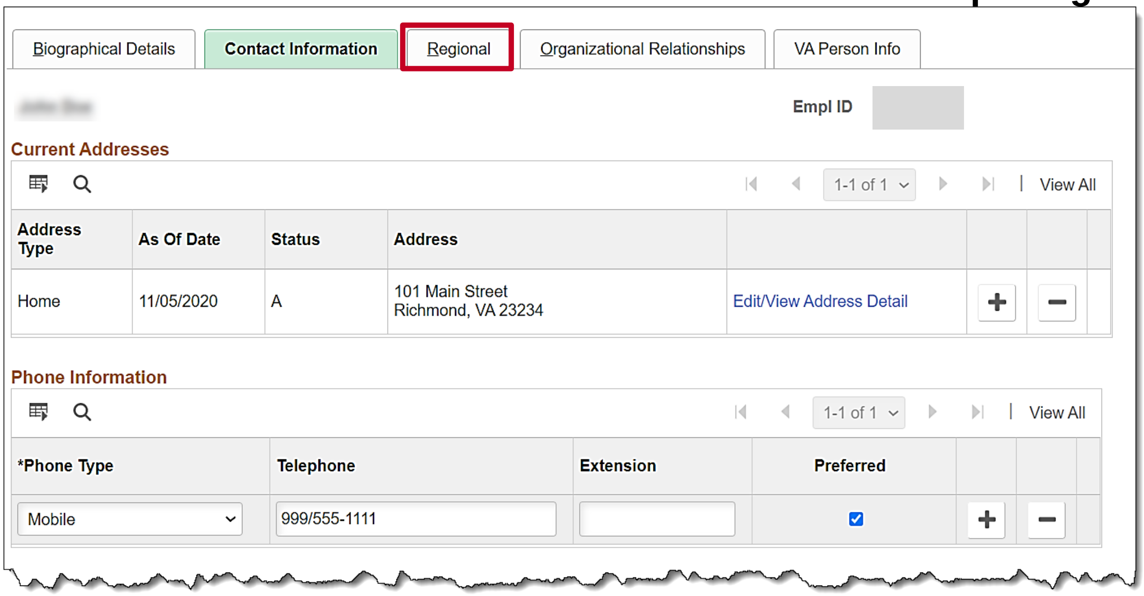
    Note: Once the employee’s business email is obtained, add a row to update this email address. <u>If this is not updated, the employee will not be able to register for access to the Cardinal system</u>.

    iv. Select the **Preferred** checkbox option

  b. If a business email will not be provided to the employee:

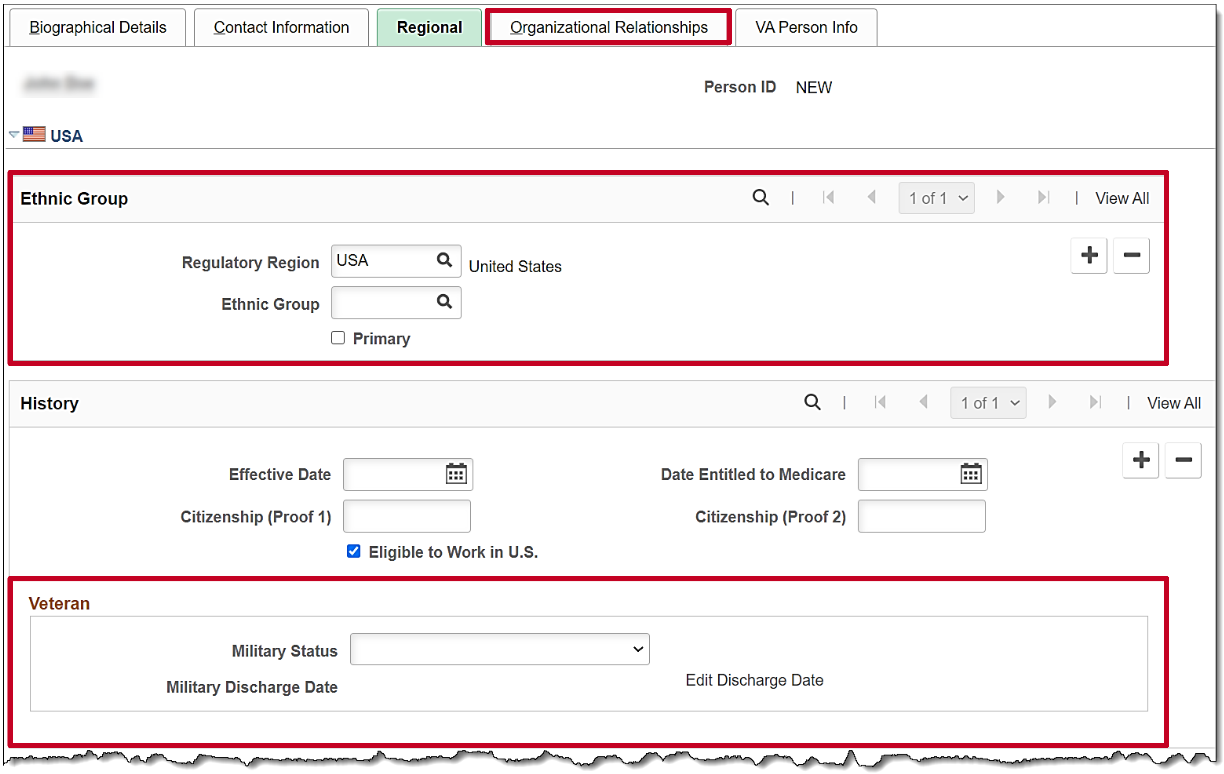
    i. Select the “Employee Provided Email” email option by clicking the corresponding radio button option
    ii. Select an email type of “Personal” using the **Email Type** field drop-down button
    iii. Enter the applicable email address in the **Email Address** field
    iv. Select the **Preferred** checkbox option

47. Scroll back up to the top of the page as needed.



48. Click the **Regional** tab.

The **Regional** tab displays.



49. Complete the **Ethnic Group** section (optional). The **Regulatory Region** field defaults to "USA". Do not change.
50. Select the employee's ethnic group using the **Ethnic Group Look Up** icon (optional).

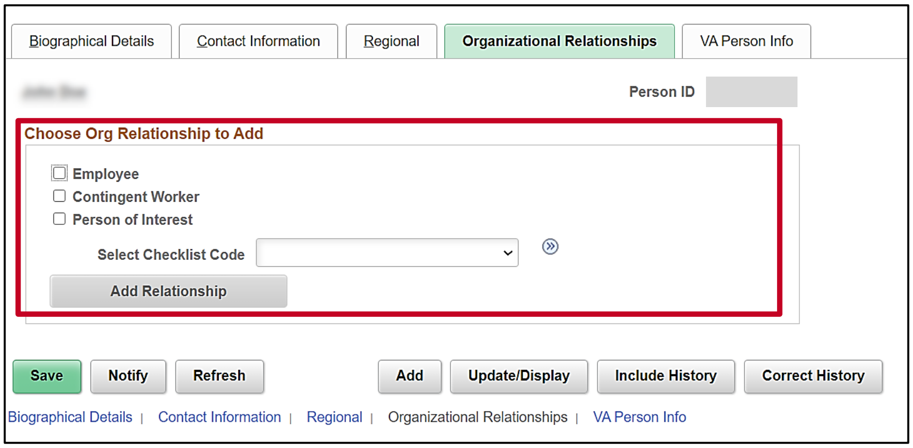
    Note: If the employee identifies with multiple ethnic groups, click the **Add a New Row** icon (**+**) and repeat this Step.

51. If the employee provided the employee's military status scroll down to select the appropriate military status using the **Military Status** drop down.

    Note: Military Status is used to provide reporting information to Veteran's Services.

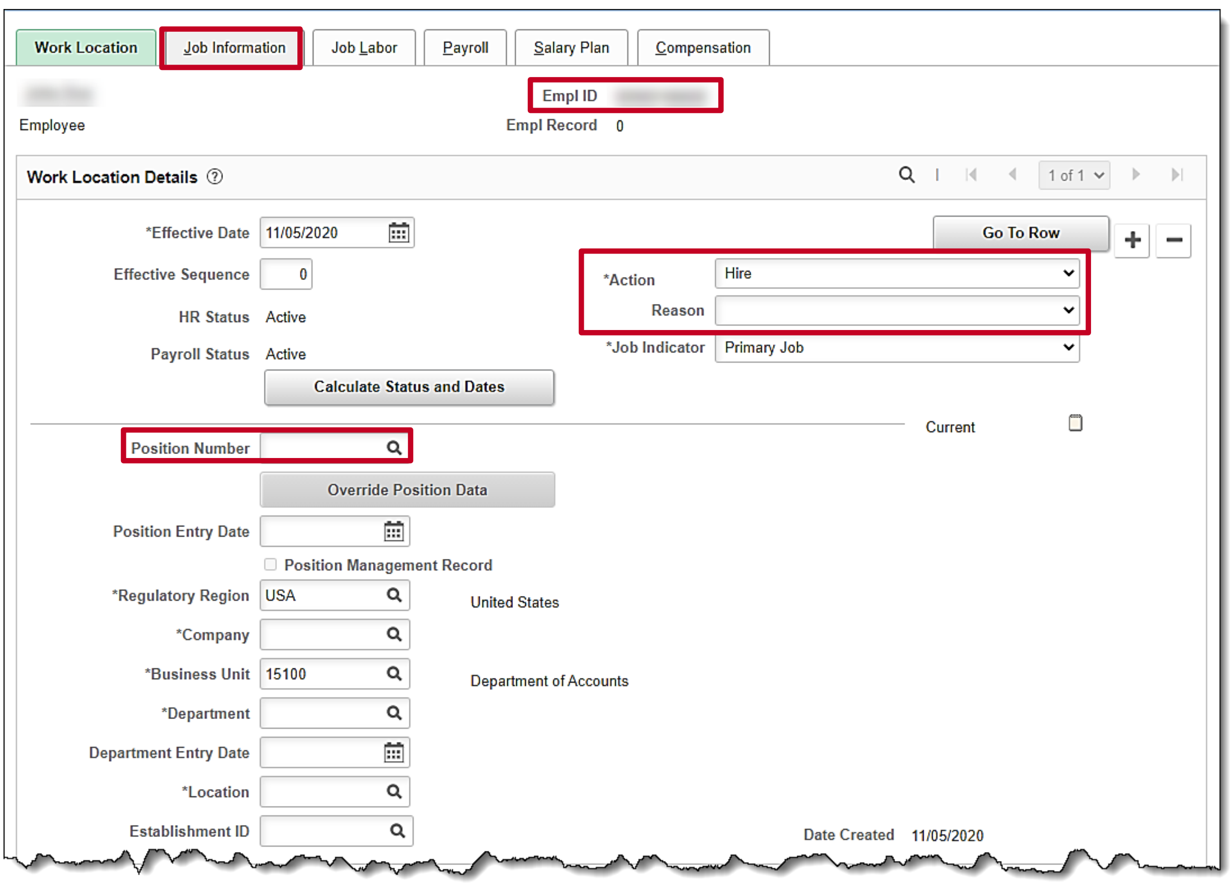
52. The remaining sections on this tab are not currently being utilized in Cardinal. Click the **Organizational Relationships** tab.

The **Organizational Relationships** tab displays.



53. Select the **Employee** checkbox option.
54. Verify that the **Select Checklist Code** field is set to “Hire”. If “Hire” is not selected, select it from the dropdown list.
55. Click the **Add Relationship** button.

The new employee’s **Job Record** page displays with the **Work Location** tab displayed by default.

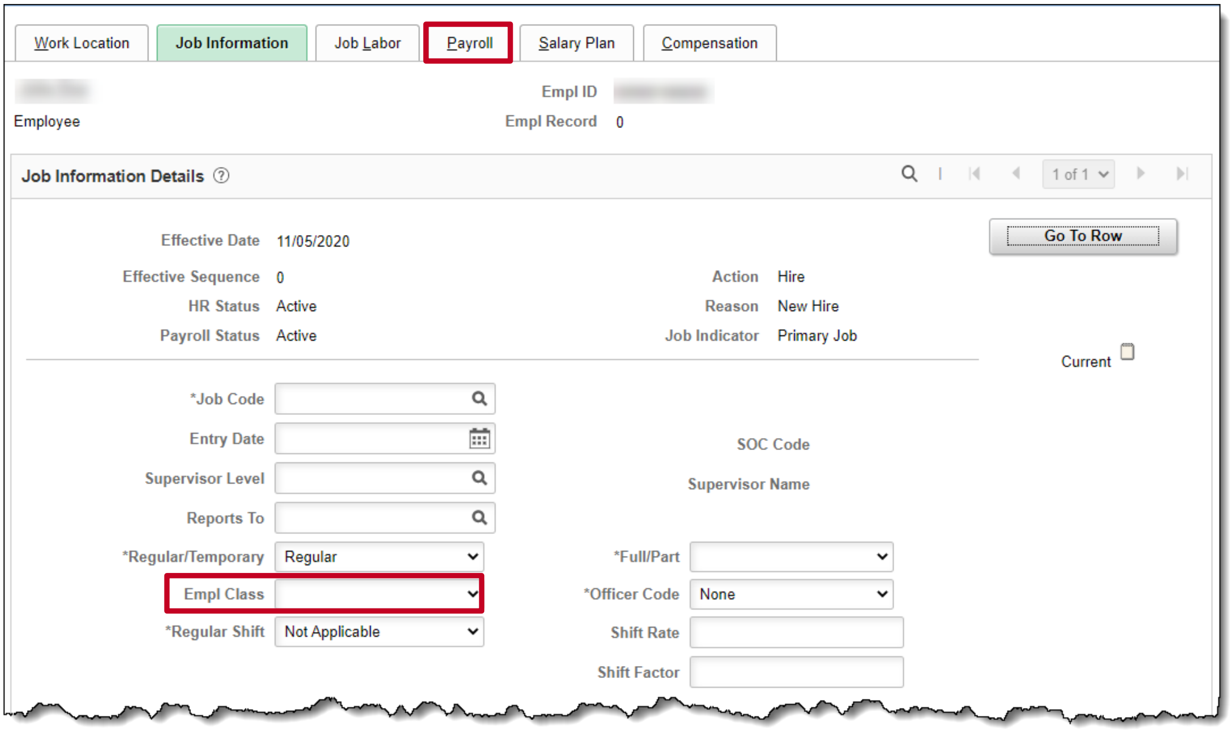


56. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

    Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

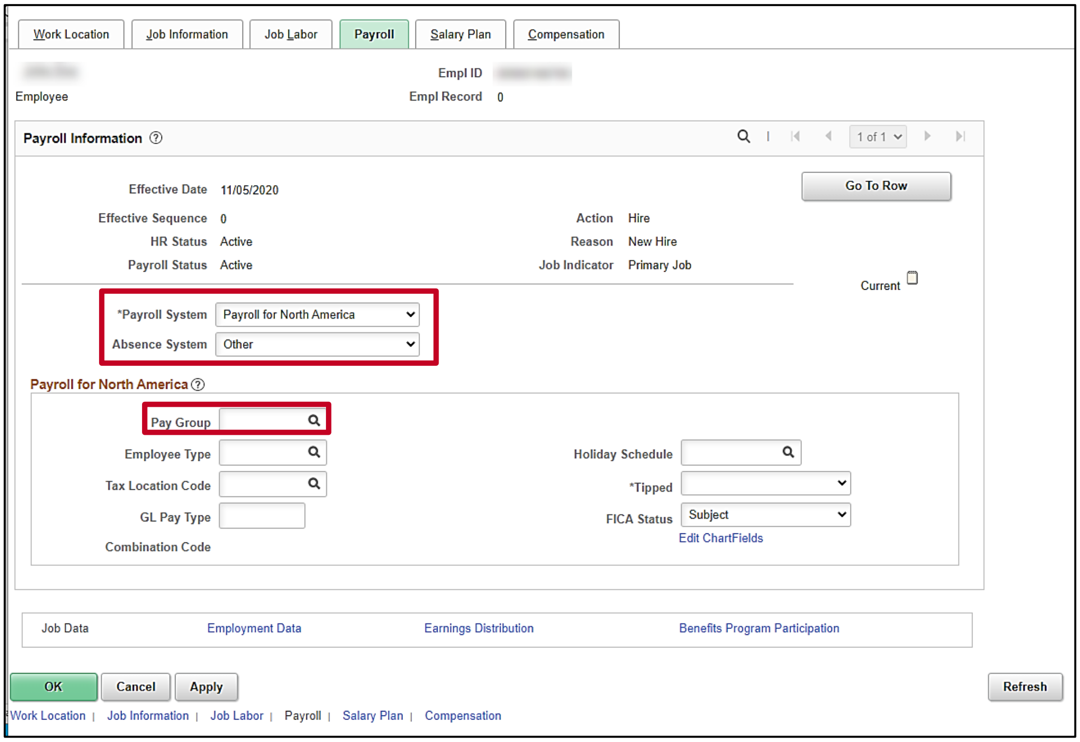
57. The **Action** field defaults to "Hire" and no other selections are available.
58. Select "New Hire" in the **Reason** field using the dropdown button.
59. Select the applicable position for the employee using the **Position Number Look Up** icon.
60. Click the **Job Information** tab.

The **Job Information** tab displays.



61. Review the information within the **Job Information Details** section. These values are populated when the Position is entered on the **Work Location** page.
62. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
63. The **Officer Code** field defaults to “None”. Do not change.
64. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.



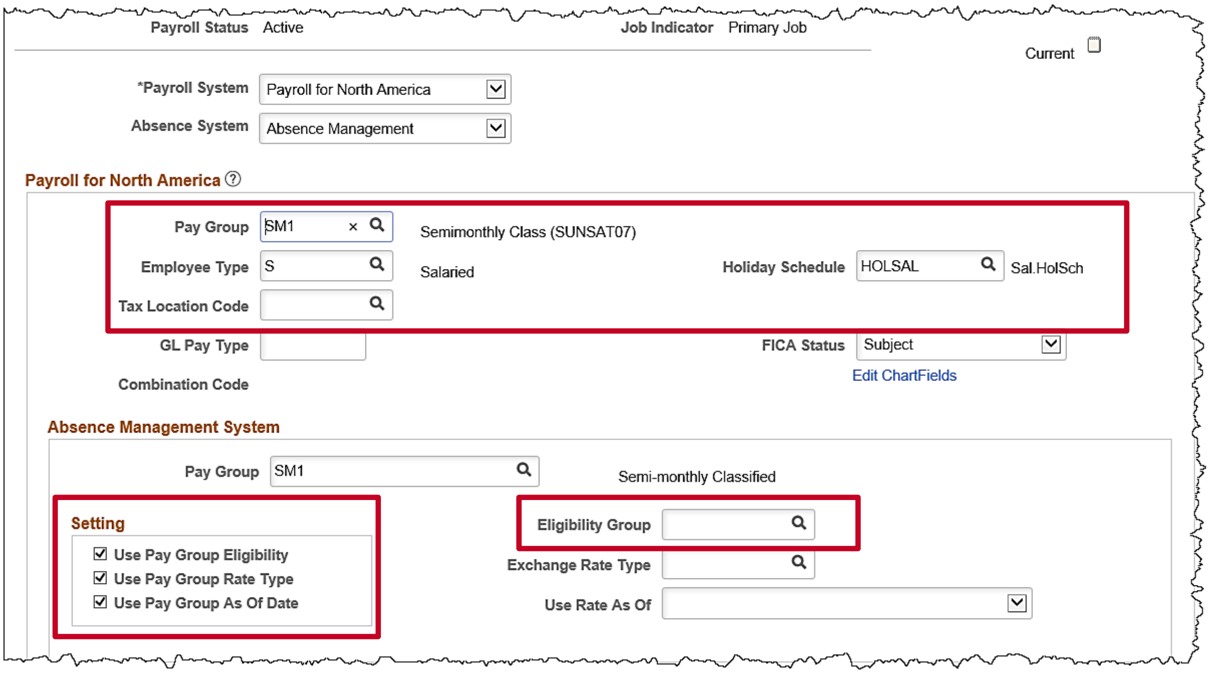
65. The **Payroll System** field defaults to “Payroll for North America”. Do not change.

66. The **Absence System** field defaults to “Other”. If the new employee’s Agency uses the Cardinal Absence System, select “Absence Management” from the corresponding dropdown list. If the new employee’s Agency uses any absence management system besides the Cardinal Absence System, verify “Other” is selected in the **Absence System** field.

67. Select the applicable Pay Group using the **Pay Group Look Up** icon within the **Payroll for North America** section.

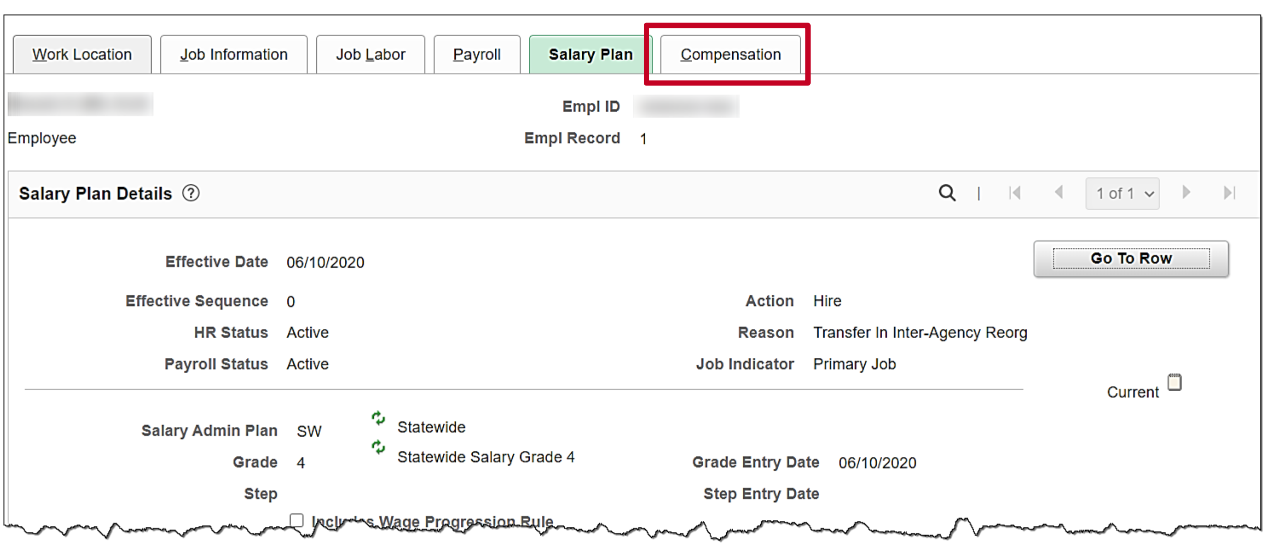
Note: FICA Status defaults to Subject, if the agency is using Cardinal Absence Management this value will remain as defaulted in.

The page refreshes once the **Pay Group** is selected.



68. The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selection. If "**Absence Management**" is selected, the **Absence Management System Pay Group** field auto-populates based on the North America Pay Group entered/selected.
69. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
70. The **Use Pay Group Eligibility** check box defaults as checked. Uncheck this box.
71. Select the applicable Eligibility Group using the **Eligibility Group Look Up** icon.
72. Scroll up as needed and click the **Salary Plan** tab.

The **Salary Plan** tab displays.

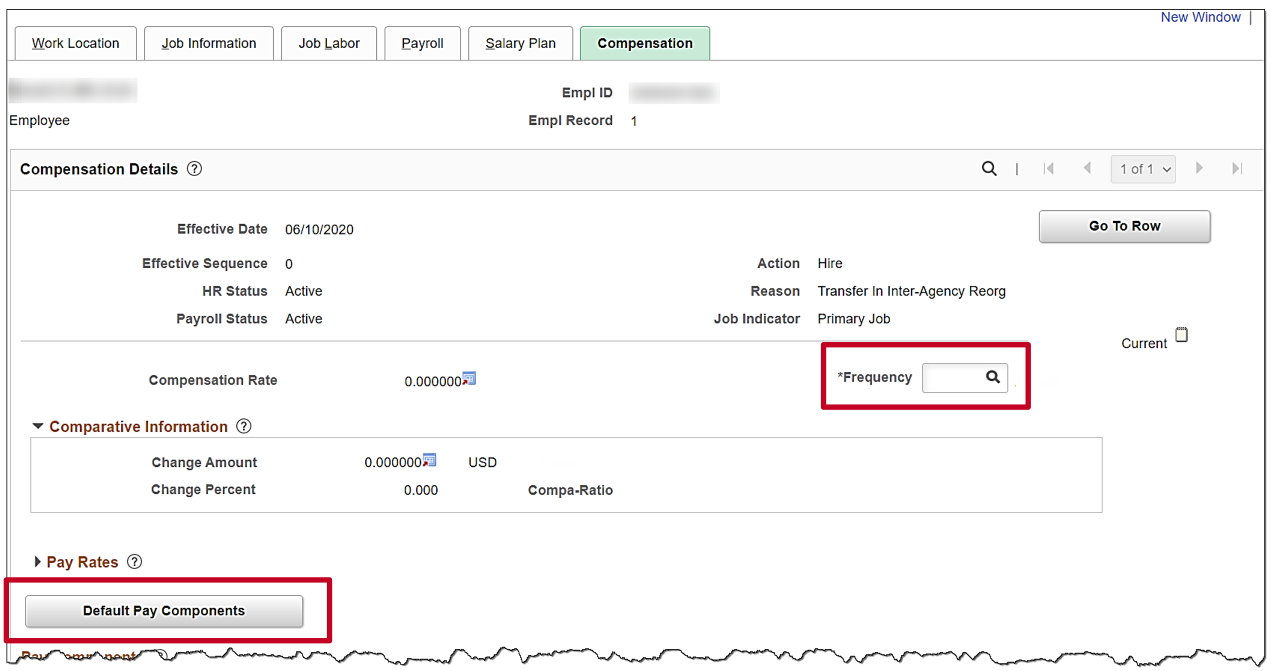


73. Review the Salary Plan information.

    Note: If the salary plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position and Job Change.** This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

74. If the Salary Plan information is correct, click the **Compensation** tab.

The **Compensation** tab displays.

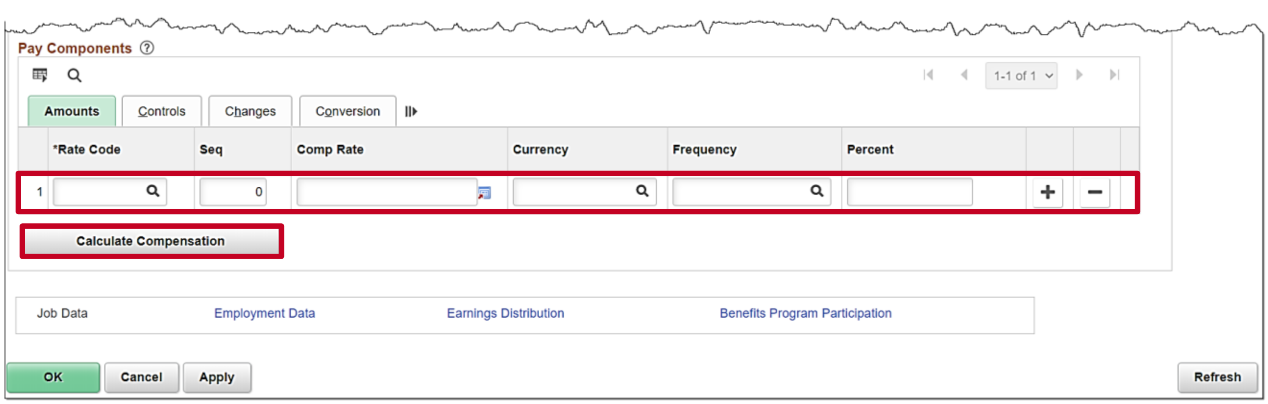


75. Select the applicable Frequency Code using the **Frequency Code Look Up** icon.

76. Click the Default Pay Components button.

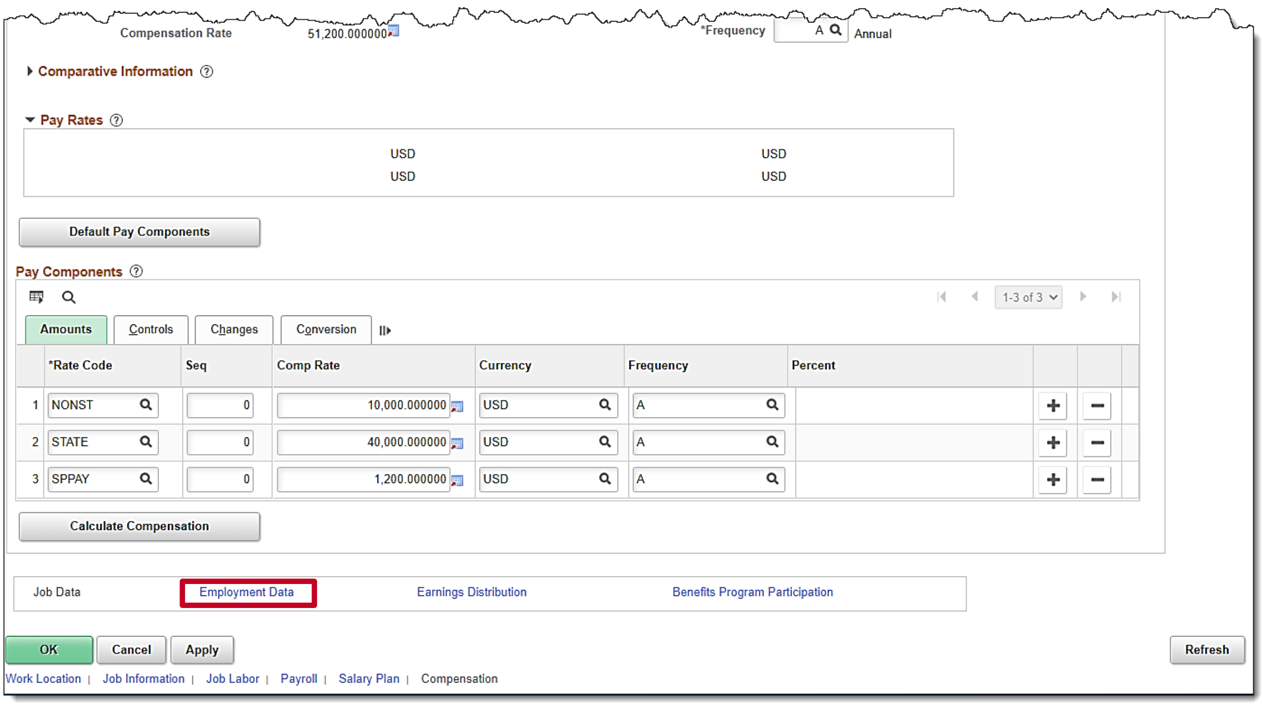
77. Scroll down to the **Pay Components** section.

The **Pay Components** section displays.



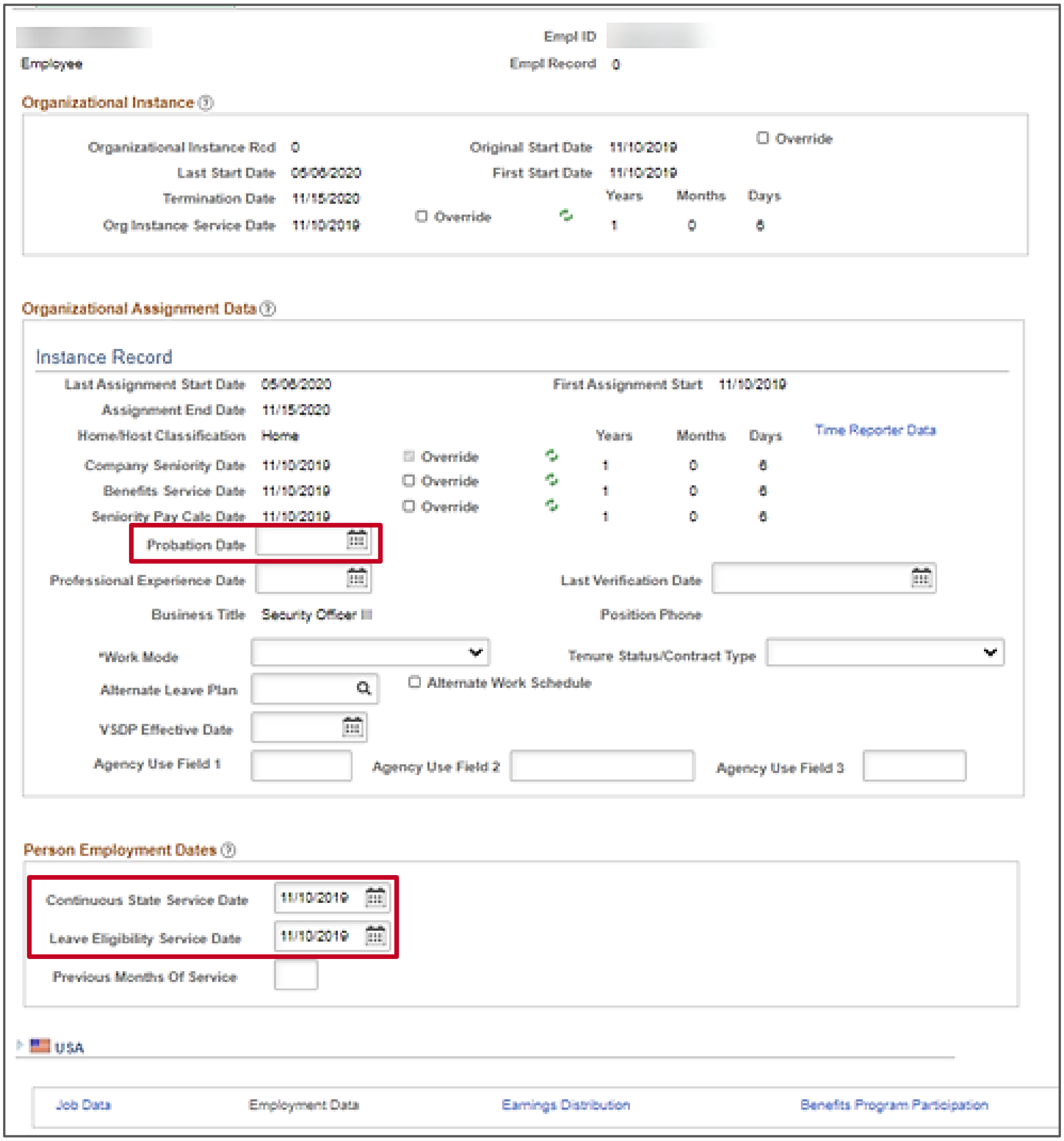
78. Select the applicable Rate Code using the **Rate Code Look Up** icon.
79. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected.
80. Click the **Add a New Row** icon (**+**) as required to enter multiple Rate Codes. Repeat steps 74 – 75 until all applicable Rate Codes are entered/selected.
81. Click the Calculate Compensation button.

The **Compensation** tab refreshes.



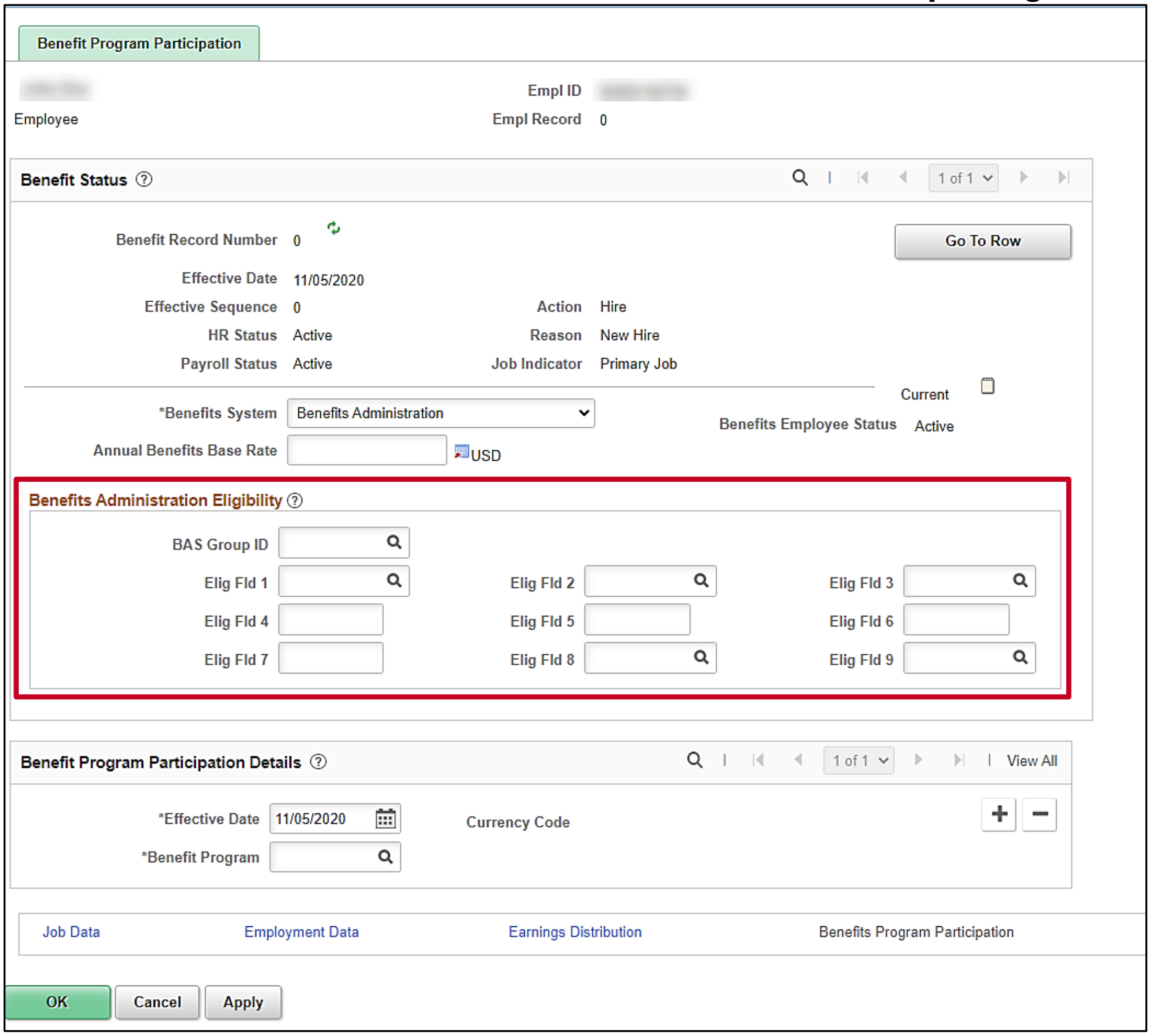
82. Click the **Employment Data** link.

The **Employment Information** page displays.



83. Enter/select the **Probation Date** for a classified new hire employee only. This date is one year from the original hire date.
84. Enter/select the original hire date in the **Continuous State Service Date** field.
85. Enter/select the original hire date in the **Leave Eligibility Service Date** field.
86. Click the Benefits Program Participation link.

The **Benefits Program Participation** page displays.



87. The **Elig Fld 1** field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually ONLY when the upload creates an error for the employee. No data entry is required unless correcting the error.

88. Click the **Elig Fld 2 Look Up** icon and select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee is enrolled (DHRM provided 9-digit number).

89. Click the **Elig Fld 3 Look Up** icon and make the applicable selection based on who will be entering time for the employee.

90. The **Elig Fld 6** (free form text) field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually ONLY when the upload creates an error for the employee. No data entry is required unless correcting the error.

91. Click the **Elig Fld 8 Look Up** icon and select the applicable pay sheet value. (i. e., 12 - 24)

92. Click the **Elig Fld 9 Look Up** icon. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER).

    Note: For further information on eligibility configuration valid values, refer to the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

    Note: Before clicking the **OK** button, review all Job Information. Once the **OK** button is clicked, the record is saved and anything entered incorrectly will require a help desk ticket for correction.

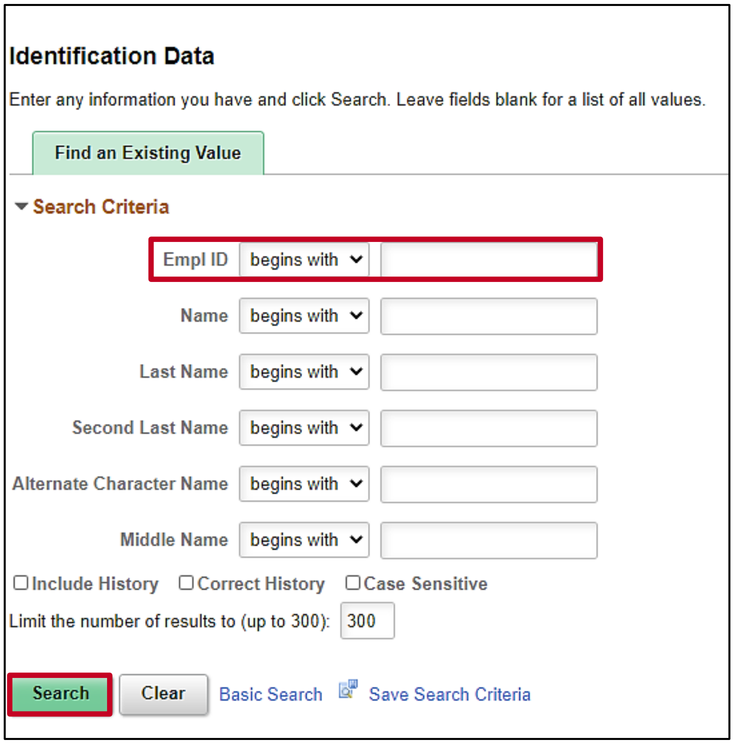
93. Click the **OK** button.
94. To continue the new hire process, navigate to the **Identification Data** page. This is required to ensure that all extracts will successfully complete. Continue to the “Add Citizenship Value to the Personal Information” section of this Job Aid.

Add Citizenship Value to the Personal Information

1. Navigate to the **Identification Data** page using the following path:

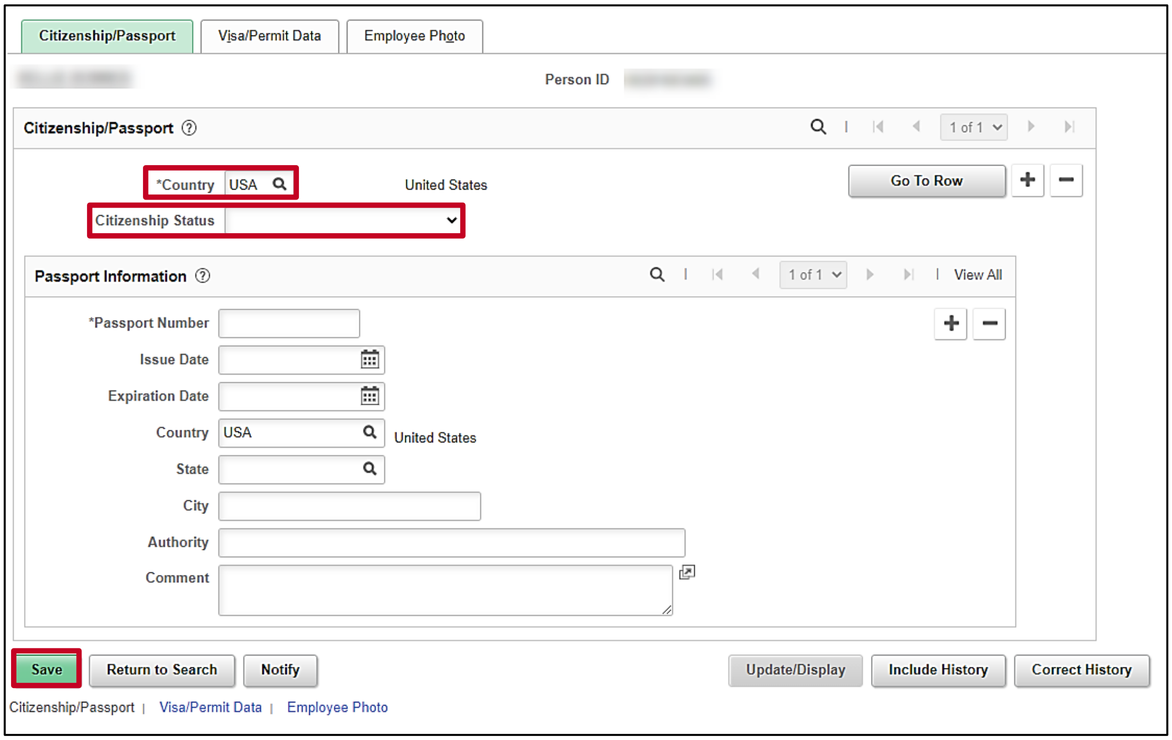
Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

The **Identification Data Search** page displays.



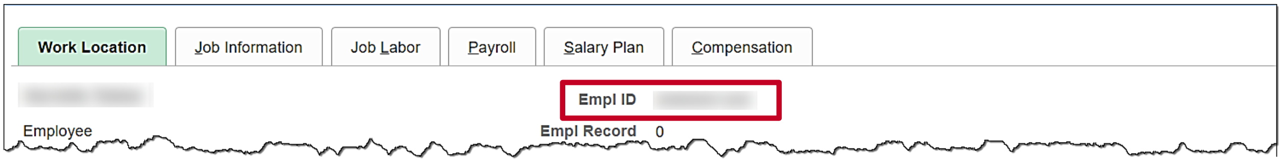
2. Enter the applicable Employee ID in the **Empl ID** field.
3. Click the **Search** button.

The **Identification Data** page displays with the **Citizenship/Passport** tab displayed by default.



4. The **Country** field defaults to "**USA**". If the employee's Country of Citizenship is not USA, select the applicable Country of Citizenship using the **Country Look Up** icon.
5. Select the employee's citizenship status using the **Citizenship Status** field drop-down button.
6. Click the **Save** button.
7. Continue to the "Run the Employee Activity Report" section of this Job Aid.

Run the Employee Activity Report



1. Highlight the Employee ID and right click the mouse to copy the Employee ID.
2. To run the Employee Activity Report for the employee, use the following navigation:

   Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

3. Run the Employee Extract Report for the selected employee.

   Note: For additional information on the Employee Activity Report, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources.**

4. Print the report and place the printed transaction in the employee file for future audit requests.